SELF- GUIDED PRACTICE WORKBOOK [N42] CST Transformational Learning

WORKBOOK TITLE: Nursing: OR Manager/Team Lead (Dynamic Case Tracking)



Last update: February 20, 2018 (v2)



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## **\*** SELF-GUIDED PRACTICE WORKBOOK

Duration	1 hour
Before getting started	<ul> <li>Sign the attendance roster (this will ensure you get paid to attend the session)</li> <li>Put your cell phones on silent mode</li> </ul>
Session Expectations	<ul> <li>This is a self-paced learning session</li> <li>A 15 min break time will be provided. You can take this break at any time during the session</li> <li>The workbook provides a compilation of different scenarios that are applicable to your work setting</li> <li>Work through different learning activities at your own pace</li> </ul>
Key Learning Review	<ul> <li>At the end of the session, you will be required to complete a Key Learning Review</li> <li>This will involve completion of some specific activities that you have had an opportunity to practice through the scenarios.</li> </ul>



## **Using Train Domain**

You will be using the train domain to complete activities in this workbook. It has been designed to match the actual Clinical Information System (CIS) as closely as possible.

Please note:

- Scenarios and their activities demonstrate the CIS functionality not the actual workflow
- An attempt has been made to ensure scenarios are as clinically accurate as possible
- Some clinical scenario details have been simplified for training purposes
- Some screenshots may not be identical to what is seen on your screen and should be used for reference purposes only
- Follow all steps to be able to complete activities
- If you have trouble to follow the steps, immediately raise your hand for assistance to use classroom time efficiently
- Ask for assistance whenever needed



## **PATIENT SCENARIO – Access and Set-up**

#### Learning Objectives

At the end of this Scenario, you will be able to:

- Utilize the Dynamic Case Tracking to view and update surgical cases
- Utilize the Dynamic Case Tracking to update surgical case details and set events
- Utilize drag and drop functionality to change surgical cases to another time or room
- Utilize the swap room functionality

### **SCENARIO**

In this scenario, a review of how to access the Dynamic Case Tracking and manage cases for the day.

As a OR Manger/ Lead you will be completing the following activities:

- Access the Dynamic Case Tracking
- View and Update Surgical Case details and Set Events
- Use Drag and Drop Functionality
- Use the Swap Room Functionality

1



## Activity 1.1 – Dynamic Case Tracking

#### **Overview of Dynamic Case Tracking**

Dynamic View is used for day-of surgical board management. The Dynamic Case Tracking functionality allows for someone managing the OR to see a snapshot of real time cases and make efficient alterations to the day's schedule.

The primary benefits of Dynamic Case Tracking are:

- Identify scheduling gaps
- Visually View case progress along a time axis
- Scroll forward and backward in time to view cases scheduled within # hours
- View and modify case attributes and case details
- Drag and drop cases
- Swap cases
- Open the patient's chart from Dynamic Case Tracking

### 2 Access Dynamic Case Tracking

1. Login to **PowerChart**.

P Pov	werCha	rt Organ	nizer for Te	estUser, (	ORMana	gement-P	eriope	rative		
Task	Edit	View	Patient	Chart	Links	Patient	List	Help		
Perior	perativ	e Trackii	ng 🖃 Me	ssage Ce	entre 👌	Patient L	ist Dy	namic Case Track	ing 🔢	Pref Card Pick
Exi	it 🖬 A	AdHoc I	IIII Medica	tion Ad	ministrat	tion 🔒 Pl	M Con	versation 👻 🛁 C	omi 2	ate 👻 🗎 M
Pa	tient H	lealth Ed	lucation M	laterials	Q Poli	cies and G	uidelin	ies 🔃 UpToDate	÷	

2. Click the Dynamic Case Tracking tab.



D	ynami	ic Case Tracking										
õ	ú I	3 🗊 🖾 🖉										
U	GH Mair	OR LGH Endoscopy LG	H Out of OR SGH Main OR	SGH Out of OR								
Ш	OR	15-Dec-2017 9:00	9:15	9:30	9:45	10:00	10:15	10:30	10:45	10:59 11:00	11:15	11:30
		Duration changed				IPt. Out of Roon						
			CONCERNING LANDER	aller in Mar		3						
		Ablation Endometri	um   Surgeon: Aslar	ni, Nava	LGHOK-2017-17	.35						
						Add-on						
						CSTSNER	SOS   58 Yea mia Inguinal   9	ars   Male   Alle Surgeon: Plisvov	ergies: Yes   LG v, Tyler, MD	но		
		LGHOR GRS										
		LGHOR GRV										
								Schedu	led			
								CSTSN	WORKBOOK O   6	53 Years   Male	a   Allergies: I	NKA   L
								Repair	Hernia Inguinal   9	Surgeon: Plisve	k, Stuart, MD	
		Duration changed				Pt. Out	of Room					
			67 Years   Male		LCHOR-2017-17	36	2 3 4					
		Ablation Endometric	um   Surgeon: Aslan	i, Nava		50						
		· ·								<mark>I</mark>		ł
	Miles	tones: 1 - Setup St	art 2 - Patient in Room	m 3 - Surgery S	Start 4 - Surgery S	Stop 5 - Patient O	ut of Room					

Note: The border color on the cases changes whenever any of the following status changes occur:

- Scheduled Green
- Earlier than scheduled -Green
- Later than scheduled Green
- Room Changed Green
- Add on Purple
- Duration changed Yellow
- Canceled Red

Duration changed	Pt. Out of Room			
4				
CSTSNWORKBOOK O   63 Years   Male   A Repair Hernia Inguinal   Surgeon: Plisvcx, St	Allergies: NKA   L :uart, MD			

As the patient statuses (milestones) are documented, they will appear along with the case status of each case detail box

3. Click Refresh



### **3** Viewing and Managing Case Details:

Each surgical area has a specific view set up in which scheduling of cases, case details, and set event information are displayed and can be managed.

Complete the following steps to view scheduling, change case details, and set event information for a case.

#### Change Case Details within the same OR:

Dynan	Dynamic Case Tracking											
ĉ (	<b>I</b>	ß										
LGH Ma	LGH Main OR LGH Endoscopy LGH Out of OR SGH Main OR SGH Out of OR											
OR	15	Dec-2017 9:00 9	):15 9	:30 9	:45 10	:00 1	):15 1	.0:30 10	11 0:45 11:00	.02	:15 11	
D 0	Duration											
LGH L	CSTPRODBCDA S   55 Years   Male   Allergies: Yes   LGHOR-2017-1735 Ablation Endometrium   Surgeon: Aslani, Nava											
	Abidtion											
0 U						Add-on						
Pdd						CSTSNERSO S	58 Years	Male   Allergies	Yes   IGHO			
SHOR						Repair Hernia I	nguinal   Surgeo	n: Plisvcw, Tyler	, MD			
$\vdash$												
	LGHO	GRS										
	LGHO	R GRV										
8								Scheduled				
НОВ								CSTSNWORKBO	OOK O   63 Years	Male   Allero	ies: NKA   L	
2								Repair Hernia I	nguinal   Surgeon:	Plisvcx, Stuart	MD	
SHW	Duration					Pt. Out of R	oom 3 4					
SHOR	CSTPRO	BCDAS   67 Ye	ars   Male   Alle	rgies: Yes   L	GHOR-2017-1736							
	Ablation	Endometrium   St	irgeon: Asiani, N	ava								

 In Dynamic Case Tracking, select the case you want from LGHOR GRV to view. Click Case Details (or right click on the case and select Case Details).





I Case Details LGHOR-2017-1739	
Scheduling	Case Information
Scheduled start: 15-Dec-2017 10:30	All procedures: Repair Hemia Inguinal
Scheduled stop: 15-Dec-2017 11:30	Surgeon: Plisvcx, Stuart, MD
Scheduled OR: LGHOR KC	Anesthesiologist:
Scheduled Move attribute:	Anesthesia type: Defer to Anesthesia
Anticipated start: 1500ec 2017	Age: 63 Years
	Gender: Male
2 Anticipated stop: 15-Dec-2017	Allergies:
Anticipated duration: 60	Assigned Staff:
Anticipated OR: LGHOR KC	
Set events:	
PostOp Phone Call Phase IPhase	Time Locked Icon Name

- The **Case Details** window opens.
- 2. Update the case information as follows in the upper left of the Case details window:
  - Anticipated start 1 hour later

Note: Anticipated Stop and Duration automatically change when the start time is changed.



• Anticipated OR - keep the OR the same

Update set events in the lower grid of the Case Details Window:



- 3. Click PreOp tab
- 4. Click on **Delay** 
  - The event moves from the tab to the right into the details window
- 5. Click OK

V Co	V Confirm Move									
Scheduled CSTSNWORKBOOK O   63 Years   Male   Allergies: NKA   LGHOR-2 Repair Hernia Inguinal   Surgeon: Plisvcx, Stuart, MD										
From To	OR LGHOR KC LGHOR KC	Time 10:30 11:30	Duration 60 60							
<ul> <li>Move this case only</li> <li>Move case and all subsequent to-follow cases</li> <li>Re-order cases within this room</li> </ul>										
⊚ Ins	<ul> <li>Insert this case and bump subsequent to-follow cases</li> <li>OK Cancel</li> </ul>									

- Review the Confirm Move window to make sure the information is correct.
- 6. Choose the option to Move case and all subsequent to-follow cases
- 7. Click OK

Dynami	Dynamic Case Tracking													
61	3 d 🛢 🔑 🖾 🖉													
LGH Mair	LGH Man OR LGH Endoscopy LGH Out of OR   SGH Man OR   SGH Out of OR													
OR	15-Dec-2017	, 15 9	:30 9	:45 10	:00 10	:15 10	):30 10	:45	11:00	:14 .1:15 11	:30 11	.:45 12	:00 12	:15 12:
	Duration change	d		IDE (	out of Room									
9					8									
CSTPRODECDA S   55 Years   Male   Allergine: Yes   LGHOR-2017-1735 Ablaton Endometrum   Surgeon: Astan, Nava														
lon 0					Add-on									
R Ado					CSTSNERSO S	58 Years   M	Allergies:	Yes   LGHO						
LGH0					Repair Hernia In	guinal   Surgeor	: Plisvcw, Tyler,	MD						
	LGHOR GRS													
	LGHOR GRV													
											1 to a the second	a distant		
R KO												euuleu		
Генс											CSTSNWORKBO Repair Hernia II	OOK O   63 Year nguinal   Surgeon	s   Male   Allerg : Plisvcx, Stuart	jies: NKA   L , MD
SHX	Duration change	d			Pt. Out of Ro	om								
A A OF	CSTPRODBCDA S	67 Years	Male   Allergies:	Yes   LGHOR-2	017-1736									
LG.	CSTRACUBECUS 5   O/ Years   maie   Amergies: Yes   LEHOK-CUI-1/30 Abladion Endometrum   Surgion: Aslain, Nava													

• Verify Case moved to an hour later.





Note: To change the view to another date and time, you can click the calendar icon



or use the scrolling arrows.

### To Change Case Details to a different OR:

 In Dynamic Case Tracking, select the case you want from LGHOR GRV to view. Click Case Details (or right click on the case and select Case Details).



- 2. Review the Case Details window. Click the ellipsis to open the **Select Operating Room** window.
- 3. Select LGHOR KC.



- 4. Click **OK** to close the Select Operating Room window.
- 5. Click **OK** to close the Case Details window. The **Confirm Move** window displays.

✓ Confirm Move										
Later than scheduled										
CSTSNWORKBOOK O   63 Years   Male   Allergies: NKA   LGHOR-2 Repair Hernia Inguinal Right   Surgeon: Plisvcw, Tyler, MD										
	OR	Time	Duration							
From	LGHOR KC	13:00	85							
То	LGHOR GRV	15:10	85							
⊚ Mo	Move this case only									
	Rump subsequent to follow cases	in LGHOR KC earlier								
	bump subsequent to-tonow cases	III EGHON NO BAIllei								
	Bump subsequent to-follow cases in LGHOR GRV later									
			OK Cancel							

- **Confirm Window** auto populates when change the case to a new room and time
- Review the **Confirm Move** window to make sure the information is correct. Keep selection

   Move this case only.
- 7. Click **OK**. When the changes take effect, the case border color changes to reflect the status of Room Changed

Room changed		
CSTSNWORKBOOK O   63 Years   Male   Allergi Repair Hernia Inguinal   Surgeon: Plisvcx, Stuart,	ies: NKA   MD	L.,



### **4** Using Drag-and-Drop Functionality in Dynamic Case Tracking

The anticipated OR for a case can be updated. You can only change the room before a case has been checked in. Once check-in has occurred the OR update must be made using the Nursing Record.

You can select a single case and drag it within the existing view to a different room, to a different time in the same room, or to a different time in a different room.

Complete the following steps to use drag-and-drop functionality to relocate a case:

	Duration	changed								
ô	CSTPRO	DBCSN T   3	7 Years   Fen	nale   Allergie	s: Yes   LG	HOR-2017-174	7   Repair He	ernia Inguinal	Surgeon:	s
GHOR k	Later the CSTSNW	an scheduled /ORKBOOK O	63 Years	Male						
			Scheduled							
			CSTSNORGAN	NAS   39 Ye	ars   Female	Allergies:	Yes   LGHOR	-2017-1756	Open Redu	uctio

- 1. Click the case to move. From LGHOR KC
- 2. Drag the case to the appropriate room (LGHOR GRV) and time

✓ Confirm Move				
Later than scheduled				
Repair Hernia Inguinal Right   Surgeon: Plisvcw, Tyler, MD				
	Time	Duration		
From LGHOR KC	13:00	85		
To LGHOR GRV	15:10	85		
		· · · · · · · · · · · · · · · · · · ·		
Move this case only				
Move case and bump				
Bump subsequent to-follow cases in LGHOR KC earlier				
Bump subsequent to-follow cases in LGHOR GRV later				

- Confirm Window auto populates when you drop the case on the new room and time
- 3. Review the **Confirm Move** window to make sure the information is correct. Keep the selection of Move this case only.
- 4. Click **OK**. When the changes take effect, the case border color changes to reflect the status of Room Changed

5



## Room changed CSTSNWORKBOOK O | 63 Years | Male | Allergies: NKA | L.. Repair Hernia Inguinal | Surgeon: Plisvcx, Stuart, MD

### Swapping Rooms Dynamic Case Tracking

You can swap cases from one room to another on the same calendar day by specifying the rooms to swap, and by specifying a start time.

All cases beginning after the start time but before the end of the same calendar day are swapped.

Once a case has the first milestone event documented (indicating that it is now intra-operative), it can no longer be moved in Case Tracking Dynamic Case Tracking.

Complete the following steps to swap cases from one room to another:



1. Click Swap Rooms I).

💤 Swap Rooms 👝			
First OR To Swap:		Second OR To Swap	
OR	15-Dec-2017 9:30 09:45 10:00 10:15 10:30 10:45 1:	11:19 1:00 11:15 11:30 11:45 12:00 12:15 12:30 12:4 ▶ ₩	
LGHOR GRS		Room changed CSTSNWORKBOOK O 63 Years   Male	
LGHOR NEW		OK Cancel	

- The Swap Rooms dialog box opens.
- 2. Select the first OR you want to swap cases for from the First OR to swap list.
- 3. Select the second OR you want to swap cases with from the Second OR to swap list.
- 4. Click **OK**. The cases are swapped.
  - The cases in First OR are swapped with the cases in the Second OR.



### Key Learning Points

- You will access Dynamic Case Tracking from PowerChart based off security and privileges of login and role.
- You will be able to update case details and set events using Dynamic Case Tracking.
- You will be able to use drag and drop functionality.
- You will be able to use swap room functionality.



## End of Workbook

You are ready for your Key Learning Review. Please contact your instructor for your Key Learning Review.